IQCS Training Manual User Guide

MODULE 3: MANAGING RESPONDER DATA

OVERVIEW

Welcome to the Managing Responder Data module. In this module, we will discuss how responder data is managed within the Incident Qualifications and Certification System (IQCS). This includes how to search for current responders, how responders are added to IQCS, how IQCS interacts with the Resource Ordering and Status System (ROSS), transferring responders between organizations, updating responder information, and how to use groups.

IQCS users are not allowed to enter, edit or remove their own data on any pages, with the exception of experience records, in the IQCS application.

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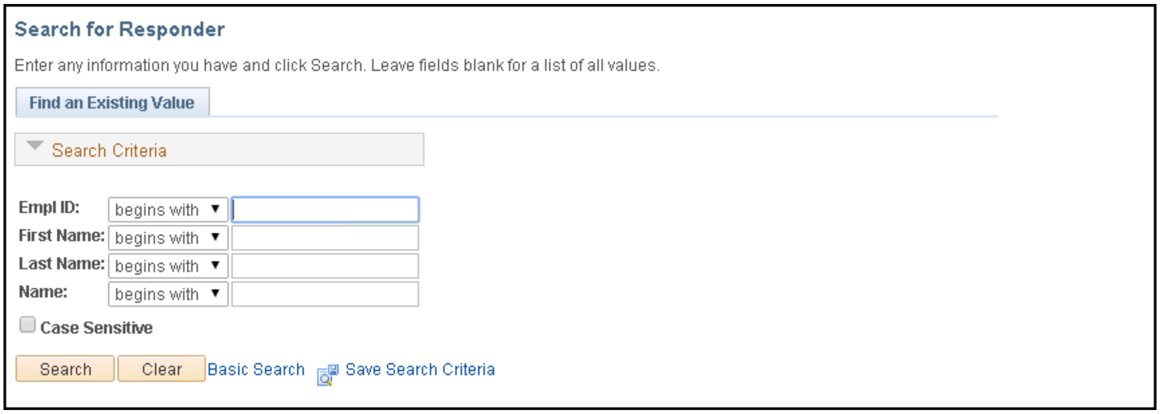
SEARCH FUNCTIONALITY

Your permission list, those organization codes requested on your account list, limits the responders that you can view in IQCS.

However, if you have the account manager or training officer role, you have access to see very basic information associated with all responders. Move to the next screen to learn how to use the IQCS search function.

In order to manage a responder's information, you will first need to locate the responder's record and ensure that he or she exists in the IQCS database.



INSTRUCTIONS - HOW TO SEARCH

To search for a responder within IQCS, follow the steps listed below.

1. Navigate to the **Responder Administration > Search for Responder**.
2. Search for your intended responder using either the Employee ID (EmplID), First Name and Last Name or Name field.
   - **NOTE**: If using the Name field, the format is LastName,FirstName (i.e., Smith,John). Do not use spaces.
3. Select your desired responder from the Search Results box.

Once you find the individual, you can view his or her record to find more information, such as the assigned training officer and account manager. If a phone number is listed, you can call to have the responder's record transferred to INAC.

Please note that the Search Results box will only display 300 results. If you receive too many results and cannot find your responder, try to refine your search by using a more specific query such as EmplID.

NEW RESPONDER RECORDS

When a responder is entered into IQCS for the first time, the account manager will establish a new record for that responder. The tables in IQCS are designed to maintain personal data such as name, home and/or business address, and business, home, and cell phone numbers. They also maintain job information history, such as organization and unit ID. In IQCS, adding a responder is treated as a "new hire" of a new responder.

Remember, IQCS is not the System of Record for personnel data. The information entered here is used to track training, certification, and qualifications for incident responders and to perform analysis of the incident responder workforce.

Data such as Office of Personnel Management (OPM) job series, pay salary plan, and grade are maintained in IQCS for workforce analysis. The system-generated Responder Identification number (EmplID) becomes the unique number associated with an individual's record.

Remember that IQCS is not a Human Resource program. It is a training and qualifications program. When you see terms like "Hire" and "Terminate," they reflect status only within the incident qualifications system, not in the HR system.

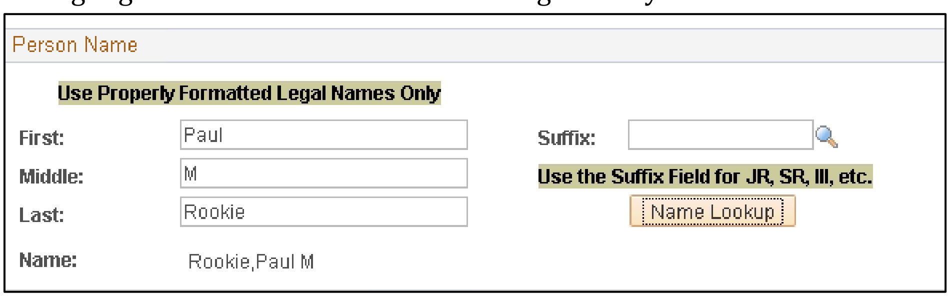
INSTRUCTIONS - ADDING NEW RESPONDERS

You can find a complete detail of the process for adding responders at the IQCS website in the Adding a New Responder Record Job Aid. These are some noteworthy things to be aware of while you are adding new responders to IQCS:

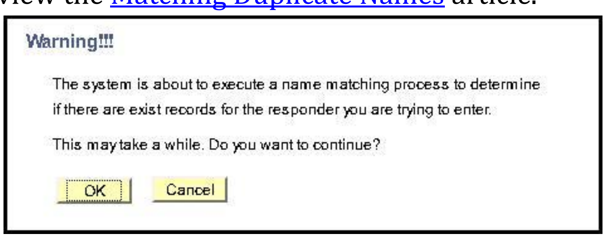
- The system will automatically assign the responder his or her EmplID.
- Entering the responder's birthday is optional. The birth date is used to estimate the responder's retirement date for workforce analysis. This date in combination with the name provides a way of identifying a unique record.
- The Dispatch Unit ID will be entered in IQCS at the time of initial hire and when transferring a responder from INAC to an active organization.
- Do not save your data on this page until all required information is entered. If you select the Save button before completing all required fields, incomplete fields will turn red and the system will direct you to fill in the required information.

To add a new responder, follow the process below.

1. Navigate to **Responder Administration** > **Add Responder**.
2. Leave the **Name Type** as **Primary**.
3. Confirm that the **Effective Date** is correct.
4. Enter the responder's properly formatted legal name in the appropriate fields (for example, First: "Paul"; Middle: "M"; Last: "Rookie"). Use the Suffix field to enter JR, SR, III, etc. Do not use periods or commas. Hyphens or apostrophes can be used, except as the first and last characters. Invalid special characters will result in a rejection of the responder record during registration in the Resource Clearinghouse system.



5. The application will perform a query when you tab out of the **Last** name field or select another tab. This query is to determine if any responder records currently exist that match the name of the responder you just entered. For more information on this function, please view the Matching Duplicate Names article.



6. Select the **Address History** tab.
7. Select the **Address Type** dropdown menu and select either **BUSN** or **HOME** to indicate whether the address is a business or home address. Only the BUSN address is sent to ROSS.
8. Confirm that the **Effective Date** is correct for the address.
9. Accept the default of **Active** for **Status**.
10. Accept the default of **USA** for **Country**.
11. Select the **Edit Address** link and enter the responder's permanent home and/or mailing address.
12. Select the **OK** button to return to the Address History page.
13. Select the **Phone Type** dropdown menu and identify the type.
14. Enter the phone number. Only the Business—Primary number will be transferred to ROSS.
15. If needed, select the + button to add additional numbers. If more than one phone number is entered, you will need to identify one as the **Primary** number.
16. Select the **Email Type** dropdown menu and select the type of email.
17. Enter the responder's email address. Only business email information is transferred to ROSS.
18. Select the + button to add more email addresses. If multiple email addresses are entered, you will have to identify one as **Primary**.
19. Select the **Birthdate** tab.
20. Enter the responder's date of birth. This information is optional. The date is used to estimate the responder's retirement date for workforce analysis.
21. Select the **Work Location** tab.
22. Confirm that the **Effective Date** is correct.
23. Accept the default of **Hire** in the **Action** field.
24. Enter the reason code **IQC** for a new account in the **Action/Reason** field.
25. Accept the default of **USA** for **Regulatory Region**.
26. Accept the default of **WCG** for **Company**.
27. Enter or look up the **Setid** for the hiring agency.
28. Enter or look up the **Organization ID**.
29. Accept the default for **Org Entry Date** (this is optional) or change as needed.
30. Enter or look up the appropriate **Unit ID**.
31. Look up and select a training officer to populate the **Training Officer** field. This is required to utilize the nomination workflow process. You can also select an **Alternate Training Officer** if needed.
32. Accept the default value of **NWCG0** in the **Setid** box under the **Admin Location** bar.
33. Enter or look up the Location Code in the Location box.
34. If the responder's Duty Station is different from the Admin Location, enter or look up the **Duty Station**.
35. Enter or look up the **Dispatch Unit ID**. This is required for ROSS for initial hiring and should be the Dispatch Unit ID of the center from which this individual is dispatched.
36. Select the **Job Information** tab.

37. Accept the default **Entry Date**. This date will populate when an account manager updates job information for a responder.
38. Select the **Empl Kind** from the values listed in the dropdown menu.
39. Identify whether the employee is Full Time or Part Time.
40. Select the **IFPM Job Data** tab.
    - This tab is only being used by the USFS to track FS-FPM positions.
41. If this responder is hired for an IFPM-covered position, Select the **Look Up** icon to select the responder's IFPM position, and then select the appropriate **Job Task**.
42. Select the **Salary Plan** tab.
43. Enter or look up the **Salary Administration Plan** and **Grade** for the responder.
44. Select the blue arrow to the right of the **Salary Plan** tab to see the additional tabs to the right.
45. Select the **Employment Information** tab.
46. If the Date of Birth field is already populated, the **Estimated Qualification End Date** field will automatically default to DOB + 55 years.
47. Select the **Save** button.
48. When the system asks if you want the responder registered with the Clearinghouse, select the **Yes** button. This is required to send qualifications to ROSS.

Instructions - Adding Non-Employees

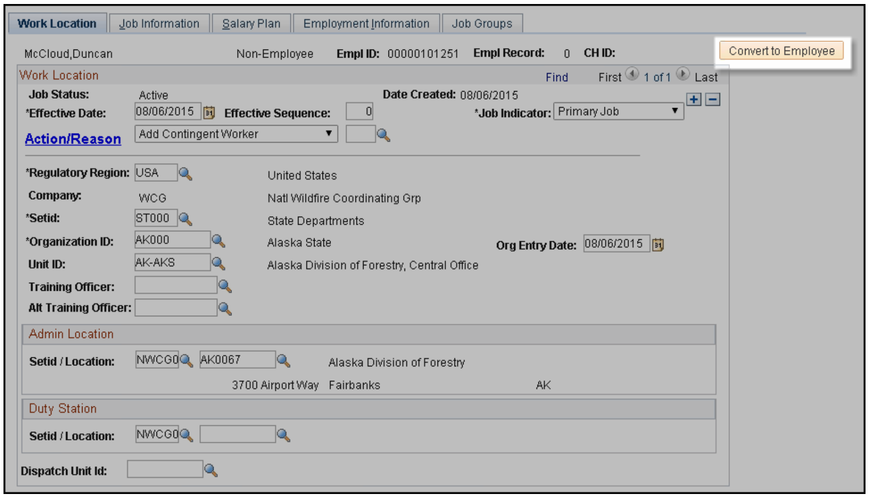
Just as with adding a new responder, you need to be careful not to save anything until all of the required information has been added. This function is to add non-employees for enable student rostering during training. **Non-employee records are never sent to ROSS.**

To add a new record for a non-employee, follow the process below.

1. Navigate to **Responder Administration** > **Add Non-Employee**.
2. Leave the **Name Type** as **Primary**.
3. Confirm that the **Effective Date** is correct.
4. Enter the responder's properly formatted legal name in the appropriate fields (for example, First: "Robin"; Middle: "V"; Last: "Hood"). Use the **Suffix** field to enter JR, SR, III, etc. Do not use periods or commas. Hyphens or apostrophes can be used, except as the first and last characters. Invalid special characters will result in a rejection of the responder record during registration in the Resource Clearinghouse system.
5. Select the **Address History** tab.
6. Select the **Address Type** dropdown menu and select either **Mail** or **HOME** to indicate whether the address is a mailing or home address. The business address will be identified later using the Location Code.
7. Confirm that the **Effective Date** is correct for the address.
8. Accept the default of **Active** for **Status**.
9. Accept the default of **USA** for **Country**.
10. Select the **Edit Address** link. Enter the responder's permanent home and/or mailing address.
11. Select the **OK** button to return to the **Address History** page.
12. Select the **Phone Type** dropdown menu and identify the type.
13. Enter the phone number. Only the Business—Primary number will be transferred to ROSS.
14. If needed, select the + button to add additional numbers. If more than one phone number is entered, you will need to identify one as the **Primary** number.
15. Select the **Email Type** dropdown menu and select the type of email.
16. Enter the responder's email address.
17. Select the + button to add more email addresses. If multiple email addresses are entered, you will have to identify one as **Primary**.
18. Select the **Non-EE Job Data** tab.
19. Confirm that the **Effective Date** is correct.
20. Select **ADD** for the **Action** field.
21. Enter or look up the reason code of **STU** in the **Action/Reason** field.
22. Enter **ST000** in the **Setid** field for all non-employees.
23. Enter or look up the **Organization ID** according to the state/local organization represented.
24. The **Unit ID** field is optional for non-employees.
25. Look up or enter the **Position** and **Admin Location** data.
26. Enter **NWCG0** in the **Setid** field.
27. Enter or look up the appropriate location for the **Admin Location**.
28. Select the **Save** button.

CONVERTING NON-EMPLOYEES TO EMPLOYEES

After a non-employee has been added, it may be necessary to convert that record from non-employee to employee. For example, that person could transfer to a federal agency or the record might have been entered in error. This conversion can be done without the assistance of the IQCS Help Desk.



INSTRUCTIONS – CONVERTING NON-EMPLOYEES TO EMPLOYEES

Responders with an employment code of “Casual” and entered as a Non-employee are considered as employees during the time of deployment and should be converted to employee.

1. Navigate to **Responder Administration > Job Data**.
2. Search for or look up the desired non-employee.
3. Select the **Convert to Employee** button.
4. Confirmation of the action is displayed.
5. Fill in each of the fields that were not previously required for a non-employee, such as **Work Location**, **Job Information**, **Salary Plan**, etc.
6. Select the **Save** button.

ROSS CLEARINGHOUSE

The ROSS Clearinghouse (CH) is a database implemented with the IQCS-ROSS interface. The CH coordinates between IQCS, ROSS and the non-federal qualification system, IQS, to track basic responder information by noting which system first entered and registered the record. It also tracks which system is the current owner of the record. The most current owner of the record is called the System of Record.

The System of Record is significant because, as the owner of the record, that system is able to update the information about that record. For every record for which IQCS is the System of Record, a Clearinghouse ID is displayed.

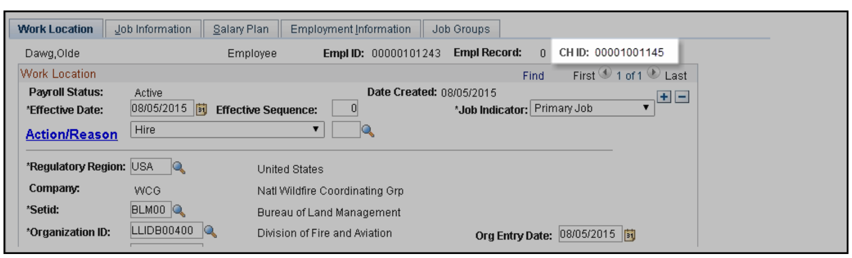
The CH ID is assigned by the CH and sent back to IQCS. It is used as the common identifying number between ROSS and IQCS. With the CH ID assigned to the responder and position qualifications identified in IQCS, the only additional IQCS information required to send responder qualifications to ROSS is the Employee Kind (Empl Kind).

CLEARINGHOUSE ID

The Clearinghouse ensures that each record is unique, based on three required data elements:

- Name
- Unit ID
- Dispatch Unit ID

Once this information is established for a responder's record, the CH issues a unique Clearinghouse ID (CH ID), which is permanently attached to that record.

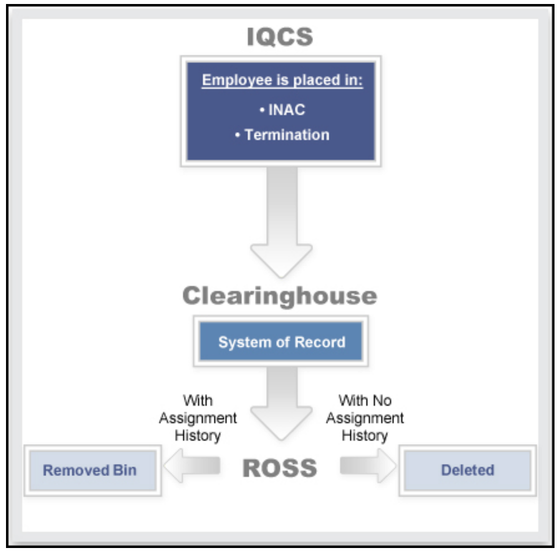


The CH ID is displayed next to EmplID on the Work Location tab of the Job Data screen, on the Name History tab of the Update Personal Information page, and below EmplID on the Qualifications page. Each responder who is newly "hired" into IQCS with the required data may request a CH ID. If a possible duplicate record is found at the Clearinghouse, the Clearinghouse Data Steward will require manual verification. Without the CH ID, qualifications cannot be sent to ROSS.

All responders who are inactive and do not have a CH ID may receive a CH ID when transferred to an active organization. To assist account managers in managing this process navigate to the Review ROSS Response Messages under the Responder Administration Menu. This page will display replies sent from the CH and from ROSS in response to actions taken by the account manager.

IQCS RESPONDER RECORD CHANGES

Every action that results in a message sent to ROSS is documented on a responder's file in ROSS. The message includes the action taken (for example: "DIVS deleted"), his or her IQCS username, System Name (IQCS), Contact Information, and Date/Time. When a responder is transferred to INAC on the Job Data page, several changes are made on the Qual Card page. The Send to ROSS and Certify boxes are unchecked and the Certifying Official EmplID is removed. This allows time for the receiving account manager and new Certifying Official to recertify the card before the position becomes available in ROSS. This sends a DEL_RSCR message to ROSS and removes the responder from the Resource Item screen in ROSS.

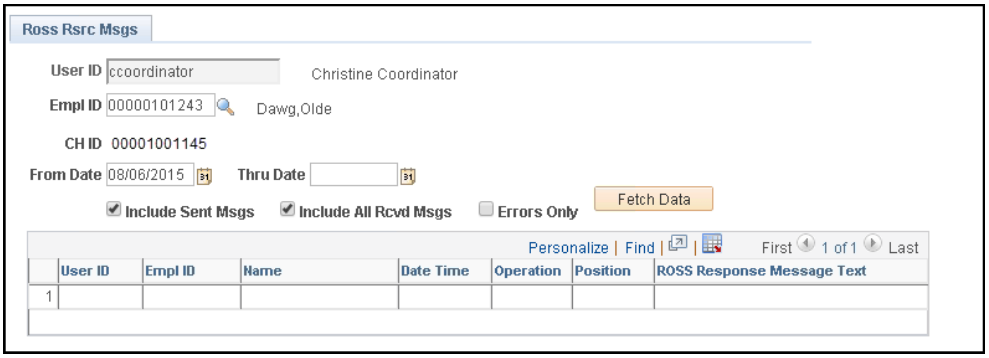


Deselecting the Send to ROSS box on the Qualification Card page and clicking SAVE will send a DEL_QUAL message to ROSS and the position will be removed from the responder's list of qualifications in ROSS. ROSS notes the action and the user ID on the documentation page. To reduce the volume of messages posted on this page, only the negative responses are displayed.

When a responder who has a Resource Clearinghouse ID is transferred to INAC, or if the action has changed to "Termination" and the reason has changed to "Death," the Clearinghouse becomes the System of Record. While the CH is the System of Record for a responder, the record can be claimed by IQCS, IQS or ROSS. This means that any of the applications can add qualifications in ROSS for the responder.

IMPACT ON THE IQCS USER

The account manager must closely monitor the Review ROSS Response Messages page. For each message, e.g. change in a qualification or a change in job location, IQCS will send a message. And for each message, we will expect a response back from ROSS. An error on this page means there is a negative response from ROSS or the CH and will require further action by the account manager.



ROSS will not accept the status change of a position while a responder is dispatched or prepositioned in that position. ROSS will reject the change message until the responder is released from the assignment. To lessen the impact on the account manager, IQCS will recycle the original message each night in a batch until ROSS status is available.

ROSS will also reject all IQCS messages if the sending dispatch center has transferred the responder in ROSS but the receiving dispatch center not completed the transfer by entering in a provider. Although IQCS will recycle the message each night until the transfer is complete, the new account manager can also notify the dispatch center of the new provider and ask that the transfer be completed.

TRANSFERRING RESPONDER RECORDS

A responder is transferred from one organization to another by changing the Organization Code on the responder's job data page. Once account managers change the Organization Code to one outside their permissions, they will no longer have access to that account.

All account managers have permission to access all accounts in the "INAC" Organization Code and to take action on these accounts.

If the responder is in ROSS, please refer to the Transferring a Responder in IQCS and ROSS article on the IQCS website for the preferred method to transfer a ROSS resource. Transferring the responder to INAC will transfer the responder in IQCS and also transfer the responder in ROSS. Once the position qualifications are marked 'Send to ROSS' at the Qualifications card, it will establish the responder back in ROSS at the dispatch center identified on the Job Data at the time of transfer.

INSTRUCTIONS – TRANSFERRING RESPONDER

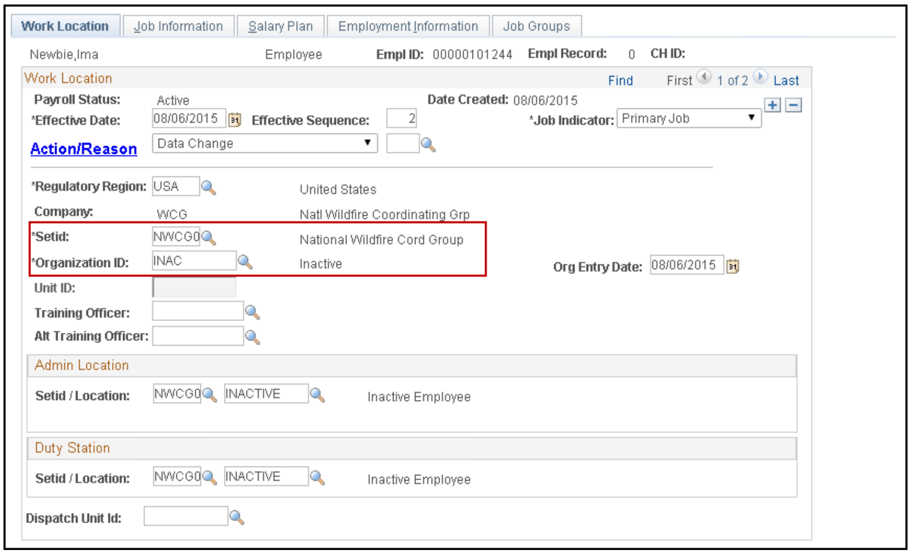
To transfer a responder, follow the process below.

1. Navigate to **Responder Administration** > **Job Data**.
2. Search for your desired responder using either the **EmplID**, **Name**, or **Last Name** field.
3. **Note**: if using the Name field, the format is LastName,FirstName. Do not use any spaces.
4. Select you desired responder from the **Search Results** box.
5. Click the + button in the top right corner of the **Work Location** page.
6. Confirm that the **Effective Date** is correct.
7. Select **Transfer** from the **Action/Reason** dropdown menu.
8. Enter **XFR** into the **Action/Reason Code** field.
9. Accept **USA** as the **Regulatory Region**.
10. Enter or look up the **SetID** for the new agency.
11. Type in or look up the **Organization ID** that the responder is being transferred to. You can look it up by using the magnifying glass. Transfer to INAC to remove from local dispatch center. This will ultimately transfer the record to the new dispatch center when new account manager sends qualifications to ROSS.
12. Confirm that the **Organization Entry Date** is correct.
13. Select the correct **Unit ID**. The look up will only return Unit ID(s) associated with the OrgID selected above.
14. Identify the **Training Officer** for the new position.
15. Accept **NWCG0** as the **SetID** for the location code.
16. Enter or look up the **Admin Location Code**.
17. Enter or look up the **Duty Station** if it is different from the Admin Location. (The Duty Station is where the responder works, while the Admin Location is where administrative action is taken for the responder.)
18. Enter or look up the **Dispatch Unit ID**.
19. Select the **Save** button.

INAC ORGANIZATION ID

INAC is the Organization Code that is used as the holding location for responders who are not currently active.

Setting a responder's record to INAC allows other account managers in other agencies, regions, units, etc., to import responders into their accounts (such as when a responder is being transferred).



A responder's qualifications account status may change due to voluntary withdrawal, change of job/duty station, change of agency, retirement from a job or incident qualifications, termination, etc.

If you have a responder who is no longer actively participating as an incident responder, you may want to transfer him or her to INAC so you will only work on active accounts. Transfer to INAC:

- When he or she has been inactive.
- When the account manager knows that a responder may not return to work in his or her unit.
- When he or she is no longer participating as an incident responder.

In order to remove them from your list of active responders, you should transfer the responder to the INAC Organization Code. You must select "NWCG0" as the Setid when transferring someone to the INAC Organization ID.

Transferring a responder to INAC will remove the responder's record from ROSS. When, or if, the record is transferred from INAC to an active OrgCode, the responders record will be sent back to ROSS once a qualification, or multiple qualifications, has been certified and identified as Send to ROSS.

INSTRUCTIONS - TRANSFERRING RESPONDER TO INAC

To transfer a responder, follow the process below.

1. Navigate to **Responder Administration** > **Job Data**.
2. Search and select the desired responder.
    - **Note**: if using the Name field, the format is LastName,FirstName. Do not use any spaces.
3. Click the + button in the top right corner of the **Work Location** page.
4. **Effective Date.** Confirm that the date is correct.
5. Select **Transfer** from the **Action/Reason** dropdown menu.
6. Enter **XFR** into the **Action/Reason Code** field.
7. Accept **USA** as the **Regulatory Region**.
8. **SetID**. Enter or look NWCG0.
9. **Organization ID.** Enter or lookup INAC.
10. **Org Entry Date.** Accept default date.
11. **UnitID**. Blanked out.
12. **Training Officer**. Blanked out.
13. **Alt Training Officer**. Blanked out.
14. **Admin Location**. Accept auto population of NWCG and INACTIVE.
15. **Duty Station**. Accept auto population of NWCG and INACTIVE.
16. **Dispatch Unit ID**. Remove dispatch UnitID.
17. Select the **Save** button.

UPDATING RESPONDER INFORMATION

It is important to keep a responder's record current. Any time a responder's job or personal data changes, it should be updated in IQCS. Data such as location, supervisor, and organization/unit is used with the training functionality of IQCS. Workforce analytics will also use personal and job data.

Job data includes:

- ✓ Organization
- ✓ Unit/subunit, location
- ✓ OPM job series
- ✓ Training Officer

Personal information includes:

- ✓ Name
- ✓ Address
- ✓ Phone
- ✓ E-mail

INCLUDE HISTORY BUTTON

The Job Data screen is a key component of IQCS. The functionality here is somewhat different from other components in IQCS. When you add a new row of data in the Job Data component, the blue bar will say 1 of 2.

After you save your new information and leave the Job Data page, the next time you return to that responder's Job Data screen, the bar will say 1 of 1. The historic record is still there, but to see the historic data, you must select the **Include History** button.

INSTRUCTIONS - UPDATING JOB DATA

Typically, you will update the job data of a responder once he or she is transferred to a unit you oversee. The process for updating job data is as follows:

1. Navigate to **Responder Administration > Job Data**.
2. Select the **Job Information** tab.
3. Enter the responder's new job code in the **Job Code** field.
4. Accept the default **Entry Date** or change as needed.
5. Set whether the responder is a full-time or part-time employee.
6. Select the appropriate **Empl Kind** value.
7. Select the **Salary Plan** tab.
8. Enter the correct **Salary Administration Plan.**
9. Enter the correct **Grade** value.
10. Select the **Save** button.

INSTRUCTIONS - UPDATING PERSONAL INFORMATION

When updating information in IQCS, select the + button to add a new row to the record. This maintains historical data. When adding a new row, all the data from the previous page will be copied from the previous record and editable. The easiest way to verify you are in a new record is by the effective date (which will be today's date). Keep this in mind while reviewing the process for updating personal information.

1. Navigate to **Responder Administration > Update Personal Information**.
2. Search for or look up the desired responder.
3. Select the **+** button to update information on the blue Name bar when the responder's name has changed. Use of the **Correct History** button should be limited to correcting errors only.
4. Update the information on the Address History tab when the responder's address information has changed.
5. Select the + button in the Address Type box to add a new type of address ("HOME," "BUSN," "MAIL," etc.).
6. Select the + button in the Address History box to add a new row for that type of address.
7. A new effective date row will appear in the blue header bar. "1 of 2" will be followed by the highlighted arrow pointing to the right. The Last link will also be highlighted.
8. Accept the default **Effective Date** unless there is a different effective date.
9. Accept the **Status** of "Active".
10. Enter the proper **Country**.
11. Select the **Edit Address** hyperlink and enter or edit the address.
12. Select the **OK** button.
13. Update phone and e-mail information as needed.
14. Select the **Save** button at the bottom of the page.

IFPM Job Information

Interagency Fire Program Management (IFPM) Standard began official implementation October 1, 2004, to enforce more stringent, uniform qualification standards for 13 key fire management positions to ensure fire fighter safety. The IFPM subcommittee has now been rechartered as the Fire Program Management Qualification Subcommittee (FPQS) under the NWCG Operations and Workforce Development Committee (OWDC). The purpose of the FPQS Subcommittee is to develop, maintain, and implement Fire Program Management Qualifications Standards.

In 2008, the US Forest Service (USFS) implemented Forest Service Fire Program Management Standard (FS-FPM) as an agency addendum to IFPM for positions that are unique to the Forest Service's four-tier structure. For additional information regarding FS-FPM, see: http://www.fs.fed.us/fire/management/ifpm/index.html.

As of October 1, 2010, the minimum qualification standards (MQS) contained in the Interagency Fire Program Management Qualifications and Standard (IFPM) is in effect. All applicants for IFPM positions after this date must possess the MQS as selective placement factors in order to be eligible.

As of 2015, the USFS is the only agency that utilizes the IFPM Job Information tab in IQCS to tract FS responders in FS-FPM positions. IFPM was fully implemented for the DOI fire agencies, and as a result, the BLM, BIA, FWS and NPS are no longer using IQCS to track IFPM responders.

The following will describe how to add, change or remove a FPM position to a USFS responder record.

Instructions - Add a FS-FPM Position to a USFS responder

1. At the responder's Job Data page select the IFPM Job Information tab.
2. Select the search icon next to the Position field to open the look up page.
3. To separate out the FS-FPM positions use one of the following options.
4. Check the FS-FPM Position box and click the Search button
5. Click on the FS-FPM Position header to sort all positions.
6. Choose a FS-FPM Position.
7. Click on the search icon next to the Job Task field and select from the values that are displayed for that position complexity on your unit.
    - It will either be 'H', 'M' or 'L' or 'Professional' or 'Technical'.
8. Select the **Save** button.

Instructions - Change a USFS responder from IFPM to FS-FPM

1. At the responder's Job Data page select the IFPM Job Information tab.
2. Click on the Plus button to add a new row.
3. Click on the search icon next to the Position field.
4. To separate out the FS-FPM positions use one of the following options
5. Check the FS-FPM Position? box and click the Search button or
6. Click on the FS-FPM Position? header to sort all positions.
7. Choose a FS-FPM Position.
8. Click on the search icon next to the Job Task field. This code will default to the original IFPM code and must be changed to an FS-FPM Job Task code.
9. Select the **Save** button.

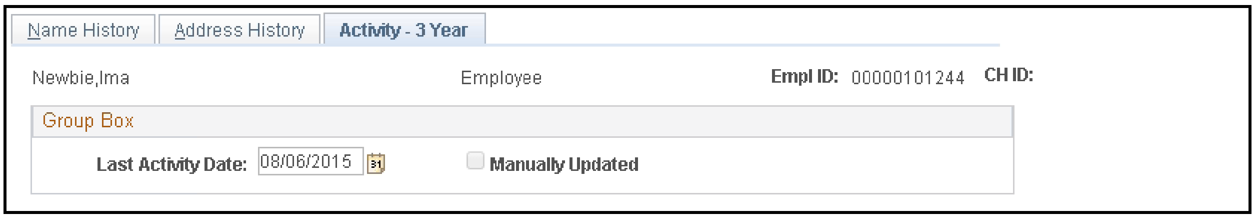
Instructions - Remove a FS-FPM Position from a USFS Responder

1. At the responder's Job Data page select the IFPM Job Information tab.
2. Click on the Plus button to add a new row.
3. Click on the search icon next to the Position field.
4. Choose XIFPM Non IFPM Position
5. Click on the search icon next to the Job Task field.
    - This code will default and must be changed to the Non–IFPM code.
6. Select the **Save** button.

RECORDING ACTIVITY

IQCS uses a Last Activity Date field in IQCS to track how often activity is performed on a responder's account. This field is updated with the current date whenever any activity occurs on the responder's account.

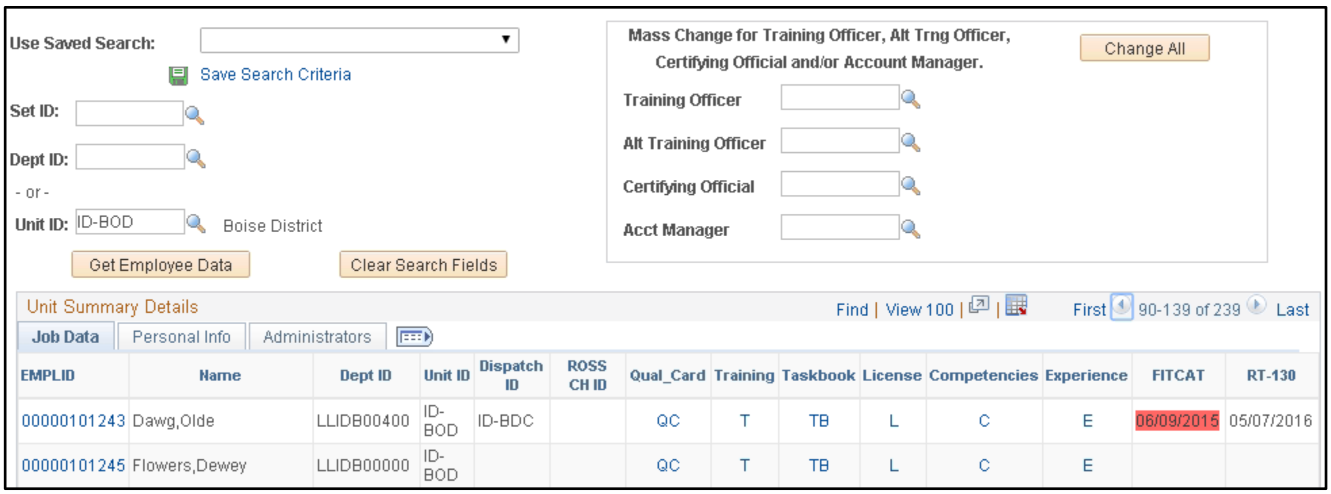
However, if there is no activity on a responder's account, the Last Activity Date field is never updated. After 3 years, IQCS will identify responders who have not had activity on their account and automatically place the account in INAC. If no activity is performed on an account in 5 years, IQCS will archive data for responders using the government standards of records management. Responders will still be available when performing searches and can be restored from INAC status to Active Org status in the event they become active again. This status will not show up on reports and the responders' records will not go to ROSS for dispatching while they are in INAC.



UNIT SUMMARY

The Unit Summary page has always been a page designed to allow users a quick and convenient method of viewing, adding or correcting responder data. Recent changes to this page allow users to view, or have one-click access, to responder data. Spring of 2015 we redesigned the page by removing and/or renaming multiple tabs; rearranging, removing and/or adding columns; we added hyperlinks; added notifications for FITCAT and RT-130; and updated the search functionality. One thing that has not changed for the Unit Summary page is the security control. Access is still controlled by roles and permissions.

We have retained the ability for user to continue making changes to the identified Training Officer, Alternate Training Officer, Certifying Official and Account Manager. However, we did remove the ability make changes to other responder data records from this page. We did this because changes made directly at this page leave no historical record for the responder. Those changes need to be made at the pages where that data is held in order to capture historical data; the hyperlinks will assist you in navigating to those locations more efficiently.



Navigate to **Responder Administration** > **Unit Summary**.

Hyperlinks

In an effort to make the Unit Summary page function as a work center, we have added hyperlinks that will connect users to a specific responder's data source page. Hyperlinks have been added on the Job Data and Personal Info tabs. When a hyperlink is selected a new tab will open displaying the corresponding page for the responder. If a change is made to data that is displayed at the Unit Summary page, the users must select the Load Responder Data button again to refresh the page and display the change. For example, a name change performed via the hyperlink at the responders Update Personal Information page will not be reflected on the Unit Summary page until the page is refreshed.

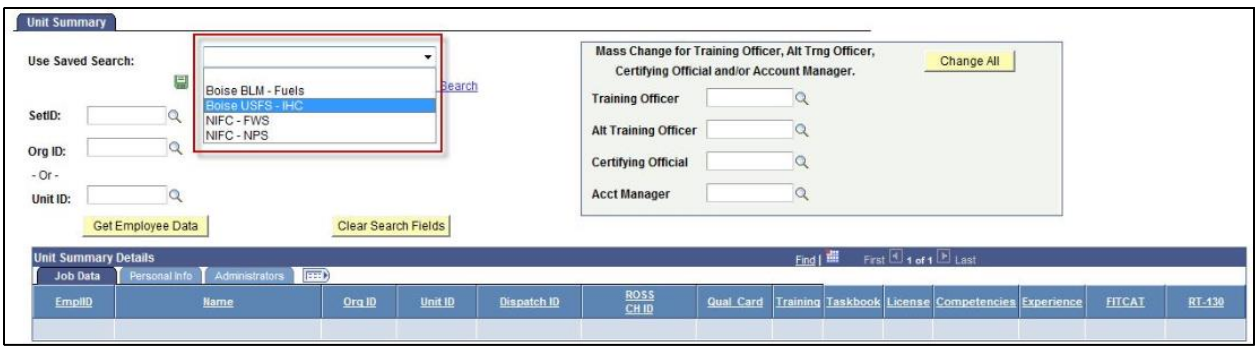
Notifications

Two notification columns have been added to the Job Data tab. The FITCAT and RT-130 columns display the competency expiration dates for each responder. This display of information is modeled after Incident Qual Card page and the data is pulled from the responder's Competencies page.

Save Searches

Throughout the program there is the ability to save search criteria thus eliminating the need to re-enter the same information over and over. We have decided to add that same functionality to the Unit Summary page.

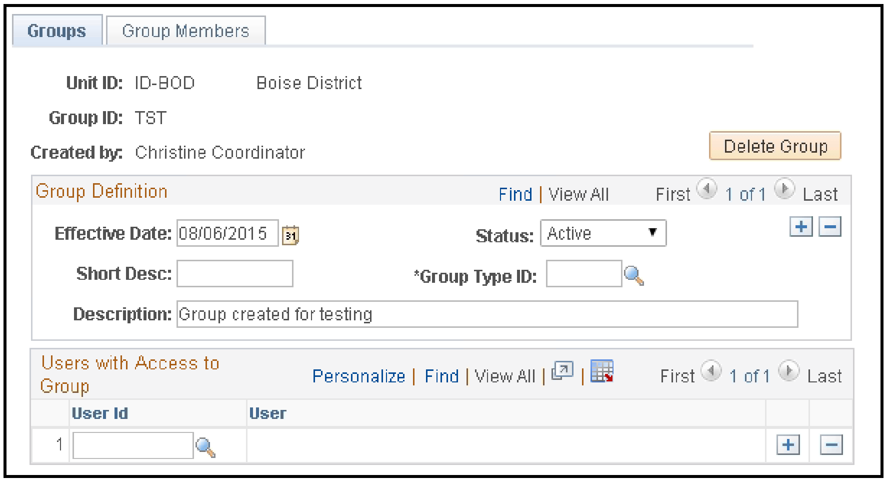
You can now create a new, or use an existing, saved search. In the example below, I have saved multiple searches to allow quick return of data from multiple Org IDs or Unit IDs. Save as many as you need and/or delete the ones no longer being used.

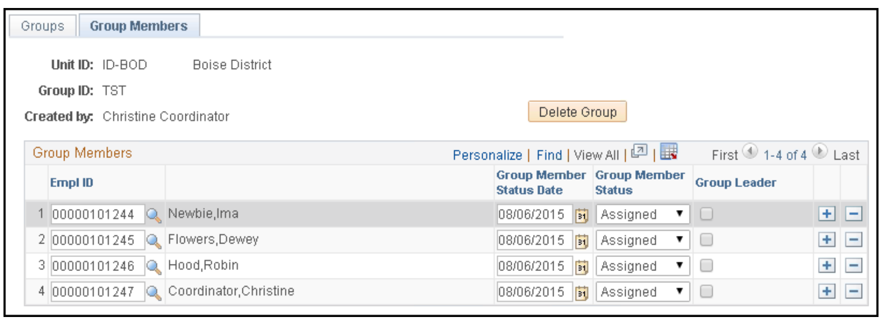


GROUPS

Each organization can define Groups to enroll a group of responders in a course session or document experience on an incident more efficiently than if you were to do it for each responder individually.

Groups defined in IQCS will not transfer to ROSS. Also, defining a group does not define a search.





Instructions - Creating a Group

To create a group, follow the process below.

1. Navigate to **Responder Administration** > **Groups**.
2. Select the **Add a New Value** tab.
3. Enter the **Unit ID** of the new group you are defining.
4. Enter the **Group ID** of the group you are defining. This should be a short, easy-to-remember code, up to six characters long.
5. Confirm the **Effective Date**.
6. Confirm the **Status** in the drop down menu. It will default to **Active**.
7. Enter or look up the appropriate **Group Type** from the Group Type table.
8. Enter a **Name** or **Description** for the group (60-character limit).
9. Enter a **Short Description** (10 characters max) for the group.
10. If necessary, select the users with access to the group. Remember that you use User ID and not EmplID.
11. Select the **Save** button.

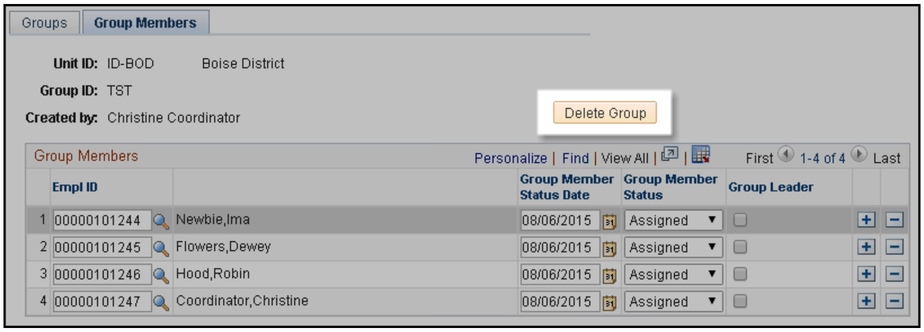
Instructions - Adding Members

To add, or edit, members to a group, follow the process below.

1. Navigate to **Responder Administration > Groups**.
2. **Search** for and select the group you want to add members to. Search by Unit ID.
3. Select the **Group Members** tab.
4. Use the **Look Up** feature to select each member to add to the group. Search by last name as needed.
5. Confirm that the **Status Date** is correct.
6. Confirm that the **Group Member Status** is correct.
7. If this member is a group leader, mark the **Group Leader** check box.
8. Click the **+** button to add additional responders to this group.
9. Repeat steps 4–7 for each additional responder that needs to be added to the group.
10. Select the **Save** button.

INSTRUCTIONS - REMOVING A GROUP

IQCS functionality at the Group page allows the creator of a group or assigned with access to this group the ability to manage a list of Groups. This functionality also includes that ability to remove a group that is no longer relevant.



1. Select the group you wish to delete.
2. By clicking on the **Delete Group** button, the user will remove the Group from IQCS.
3. After clicking on the button, a warning window will open to ask the user to verify the requested action.
4. The deletion is executed by clicking on the **SAVE** button.
5. If you decide not to delete the group after clicking the Delete Group button, click on the **Return to Search** button and select **Cancel** to continue.